

CITY OF FRESNO

PEOPLESOFT 8.3 QUERY TRAINING MANUAL





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Query Overview

PeopleSoft's database is designed to support SQL. Standard "Structured Query Language" (SQL) statements and concepts are used to construct queries in PeopleSoft. The constructed queries consist of databases, fields, and selection-criteria.

The SELECT command finds, retrieves, and displays data from tables or views.

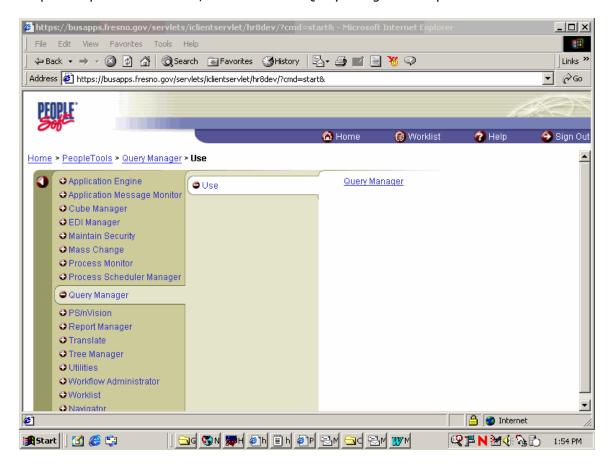
The basic syntax is:

SELECT <expressions> FROM <table(s) and/or view(s)>

For a complete overview of SQL, please refer to the expanded version of this manual.

Accessing Queries

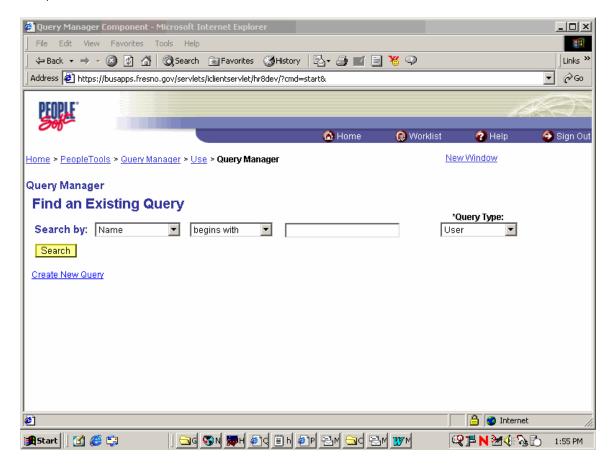
PeopleSoft queries are created, edited & run via QueryManager on PeopleTools:



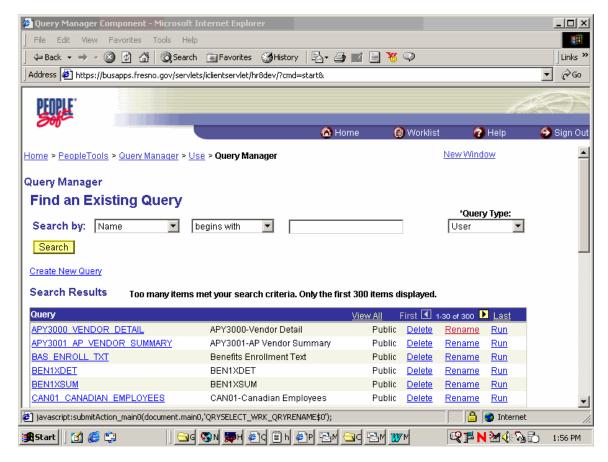
Running Existing Queries from QueryManager.

The QueryManager provides access to available predefined queries. New queries are created by clicking on the link 'Create New Query'.

When Searching for an Existing Query, note you can search by name, along with Query Type of User, Role or Process as a criteria.

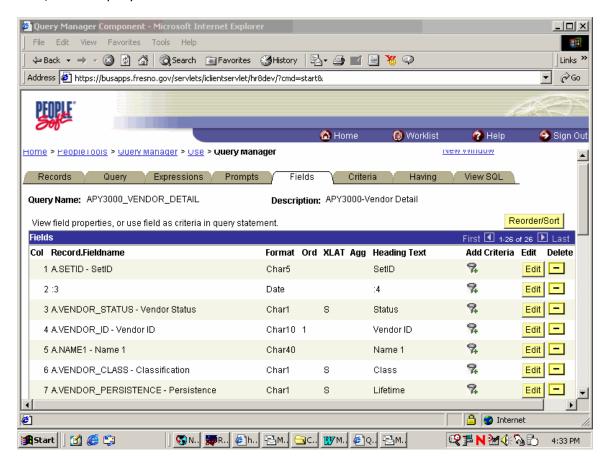


A list of existing queries is returned from the Lookup, for the given criteria. Private queries appear first, Public queries after. Search results include a query-name, description, view & 3 action-links: Delete, Rename & Run.

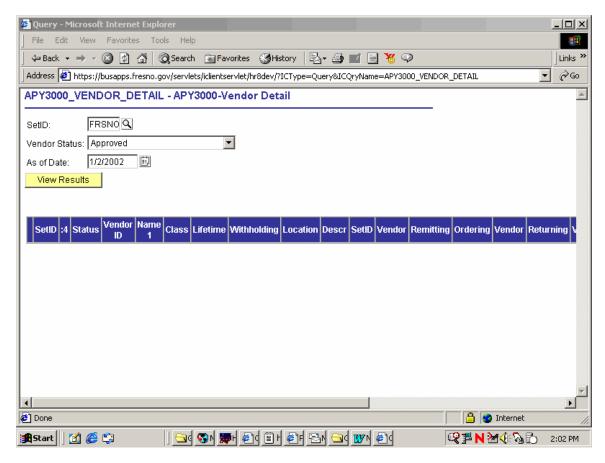


You can choose to edit a query by clicking on it, or take actions of Delete, Rename or Run. Clicking on the Query name, will bring up the query for editing.

Here, the first query listed is selected:

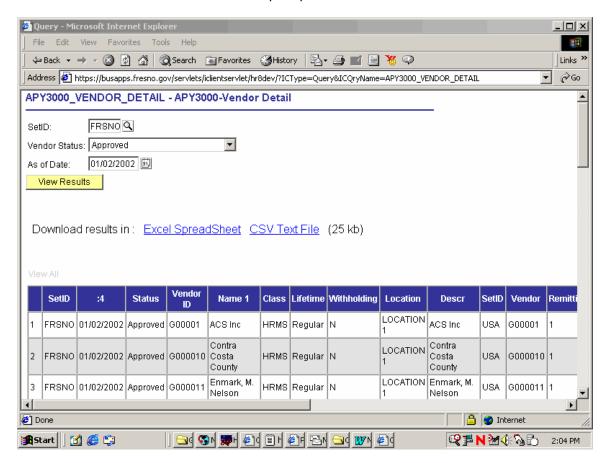


Details on editing options are explained later in this manual. To run a Query, click on the Run action-link from a listed query. Any query prompts will be displayed, along with an action-button to 'View Results':



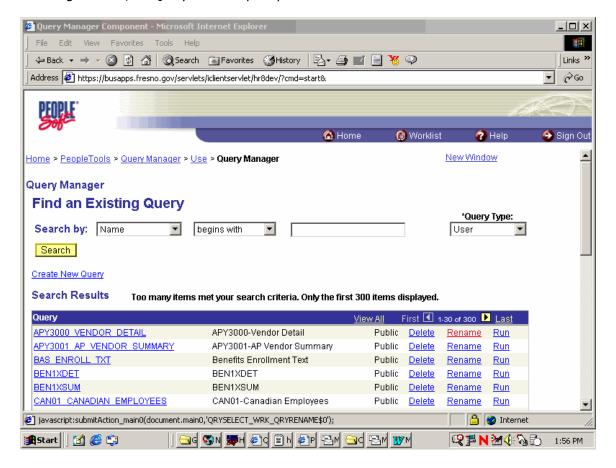
After entering prompt values, click the 'View Results' button.

Shown below are results from the entered prompts.

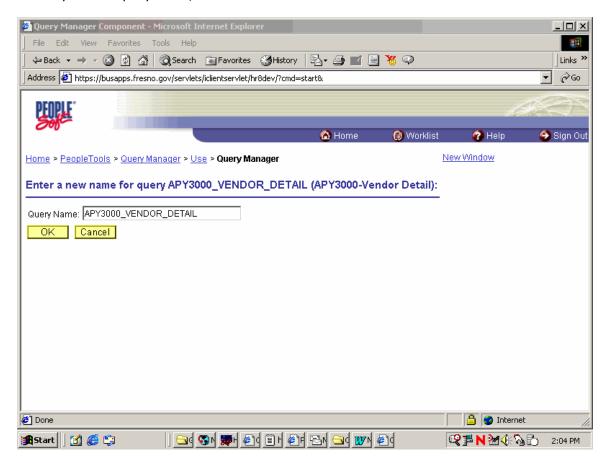


Query results can be downloaded to Excel, text, or a Printer. Action-links for Excel & Text downloads are underlined in blue.

Choosing Rename, on Query List item prompts for a new name:

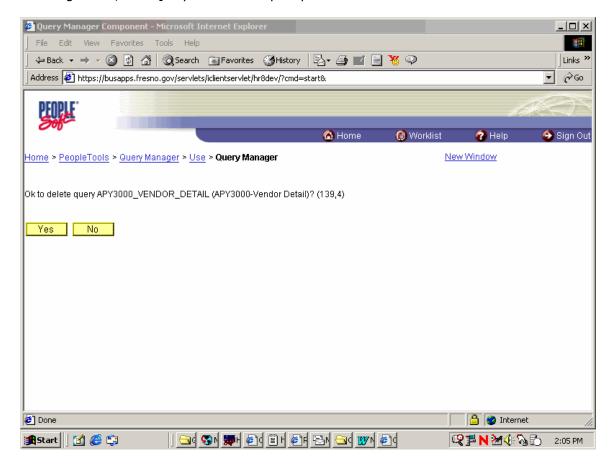


You may enter a query-name, or select from the search list:



You may enter a new name for the query. Then click OK to confirm or click Cancel.

Choosing Delete, on a Query List item will prompt for a new name as follows:



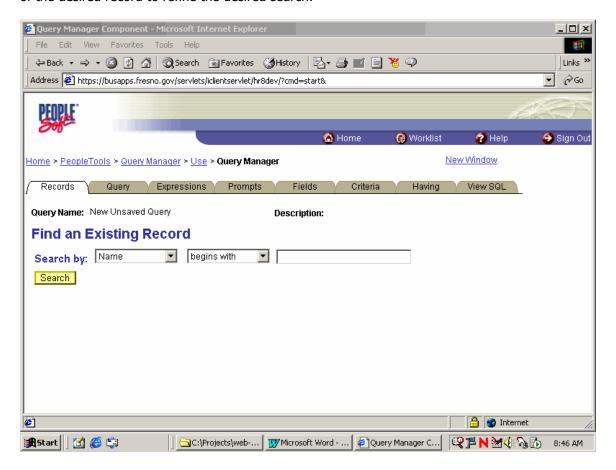
Click either Yes or No, to delete the query.

Creating new Queries.

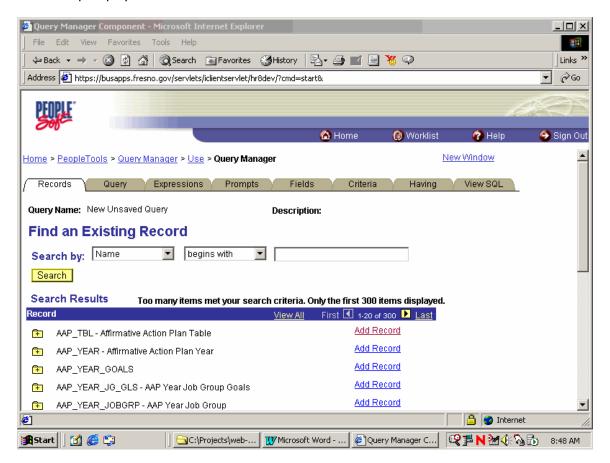
The Query Manager gives a user the ability to create new queries, modify existing queries, and save a query. A Query definition may be specified for a User, Role, or Process, depending on the chosen Query Type. The default Query Type is User, where queries are saved as private queries and are accessible only by the user.

To create a new Query, click on the tab 'Create New Query'.

This will prompt for Records, to be used to choose fields for the query. Enter the first few letters of the desired record to refine the desired search:

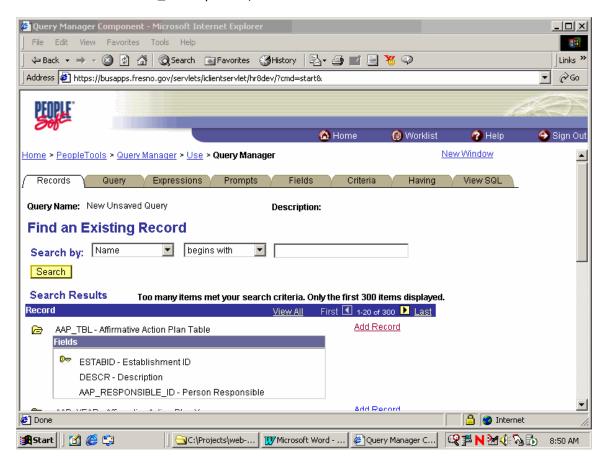


The Lookup displays available records.



You may expand a record by clicking the yellow-folder with a '+' symbol .

Shown below is the AAP_TBL expanded, with it's fields listed:



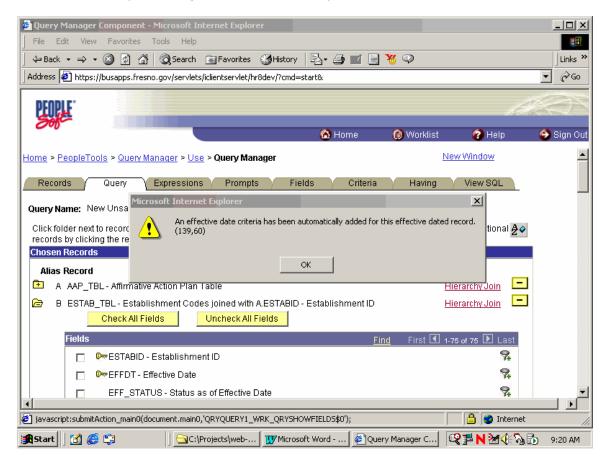
You may add a record - for the query's use - by clicking the 'Add Record' action-link.

The record will be displayed in the Chosen Records dialogue box:



You may individually check Fields for use, or use the "Check All Fields" or "Uncheck All Fields" buttons. Choosing to Join one of the Fields - to related table under the 'Find' tab - will bring in that table's records for the query.

In the above example, clicking on "Join ESTAB-TBL" produces:

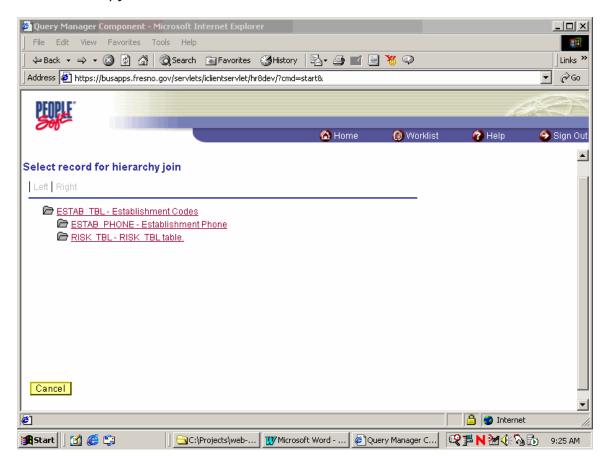


The ESTAB_TBL is now in the 'Chosen Records' list.

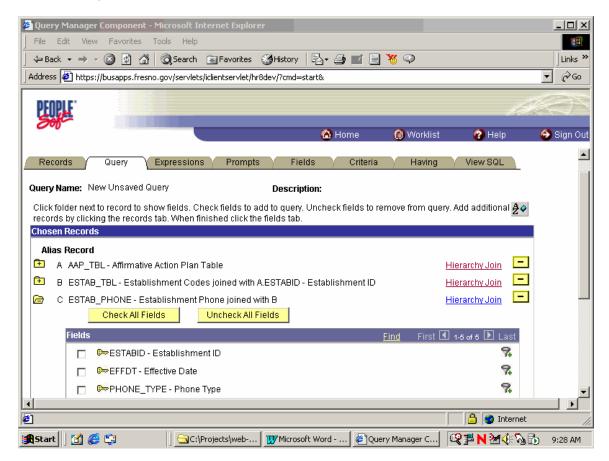
Note, the system will automatically insert effective-date-criteria for effective dated records. This is shown in the warning caption above.

The query is capable of higher level joins. For instance, on record ESTAB_TBL, clicking on 'Hierarchy Join' link allows selection of tables to join.

In this instance, the 'ESTAB PHONE' & 'RISK TBL', along with ESTAB_TBL itself, are valid records for the hierchary join:

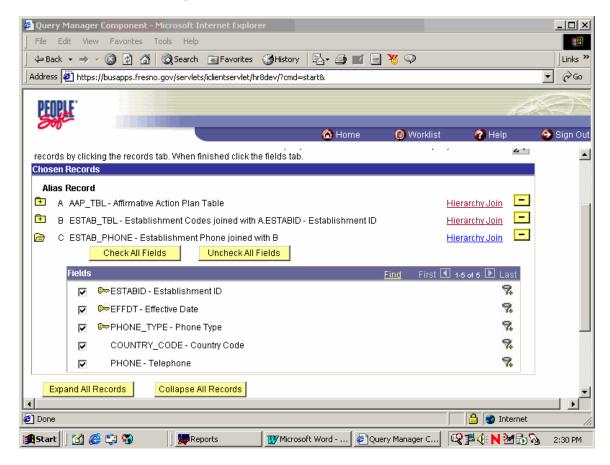


For this example, the ESTAB PHONE record is selected:



The expanded join table (ESTAB_PHONE) is displayed as a Chosen Record, You may individually check Fields for use, or use the 'Check All Fields' or 'Uncheck All Fields' buttons.

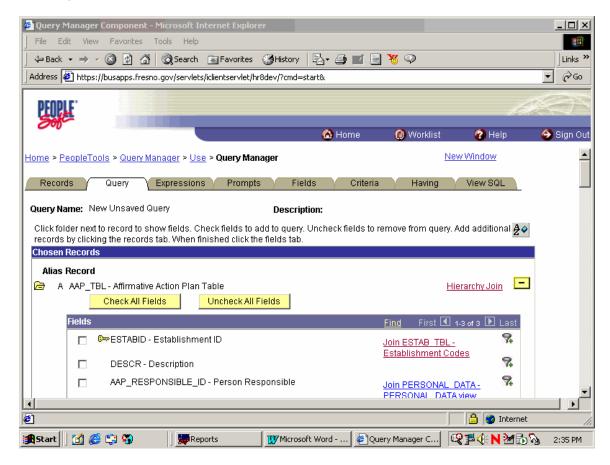
Below is the result of clicking 'Check All Fields'.



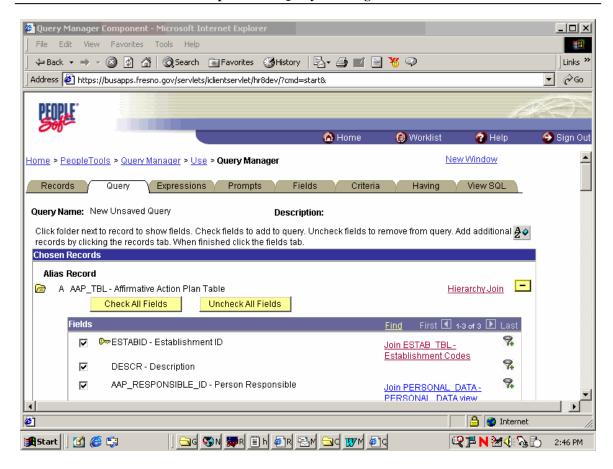
An individual folder may be expanded or collapsed by clicking on the Yellow-Folder icon (showing a '+' or '-' indicator under 'Alias Record').

This action can be applied to all records via the 'Expand All Records' and 'Collapse All Records' buttons.

Here 'Expand All Records' results are shown:



All records are shown, with fields expanded, by scrolling downward.

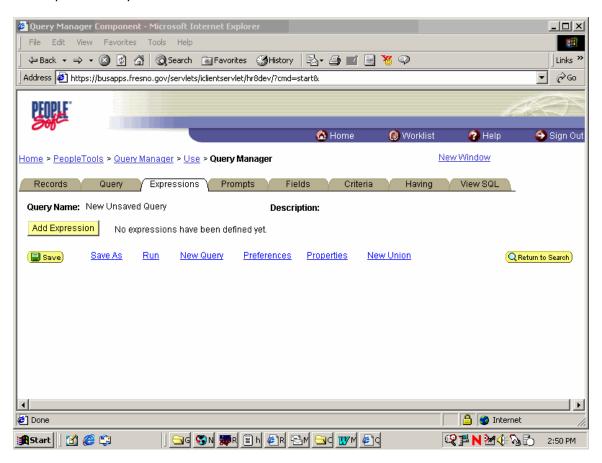


Note a 'Hierarchy Join' may be added by clicking it's Action-link. Also, if a hierarchy join exists, it may be removed by clicking the '-' button next to the 'Hierarchy Join' link.

So far, the 'Records' & 'Query' tabs have been used.
The Query Manager also provides these Action-Tabs:

'Expressions', 'Prompts', 'Fields', 'Criteria', 'Having' and 'View SQL'.

Clicking on the 'Expressions' tab will display existing expressions, and allow modification, or a new expression may be added.

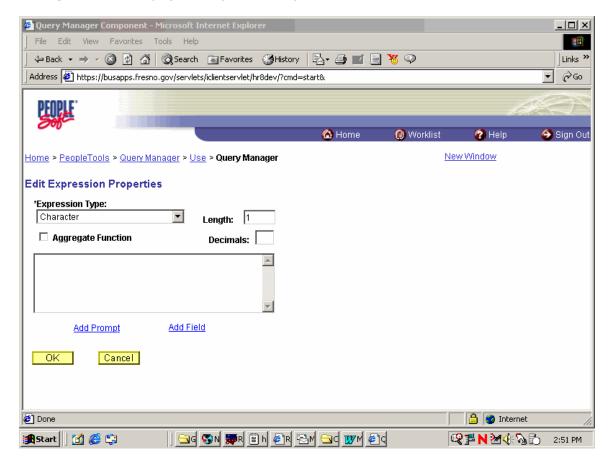


The 'Add Expression' button is used to add an expression.

Expressions may be defined for use as selection Criteria, under the Criteria tab.

If you attempt to add criteria, using an expression before any are defined, an error occurs preventing this.

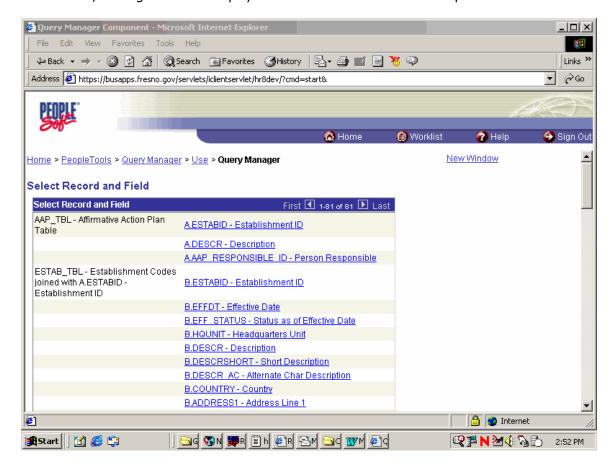
Clicking this button displays an 'Expression Properties' window:

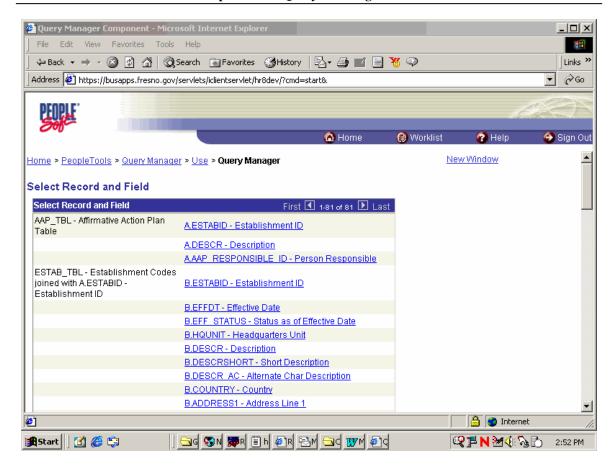


You may specify the Type, Length, Decimals & 'Aggregate Function' properties. The main function is to 'Add Prompt' or 'Add Field' to base the expression on.

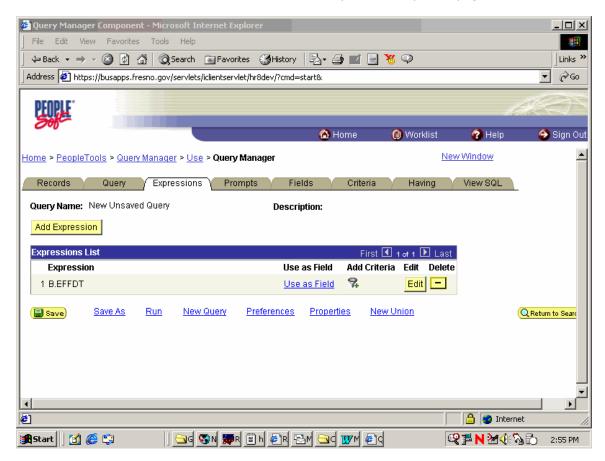
After updating Type, Length, Decimals & 'Aggregate Function', you may click on 'Add Prompt' or 'Add Field'.

For instance, clicking 'Add Field' displays all fields available to build the expression:

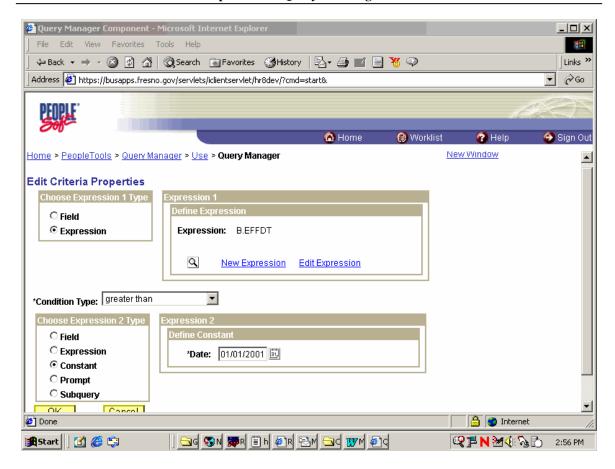




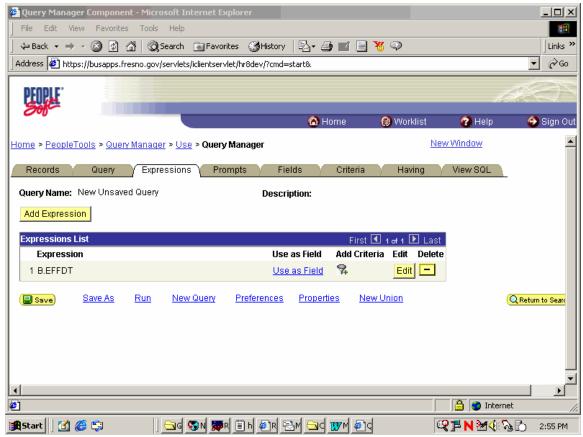
Choose a field from the list, and it is returned to the Expression Properties page:



You can click on the 'Add Criteria' icon (a gray-funnel & green '+' symbol). This will display the 'Edit Criteria Properties' page, which allows a 'Condition Type' to be chosen to build the expression. The chosen expression field (1) will be compared, by the 'Condition Type' to the selected 'Expression 2' value. The 'Expression 2' may be selected as a Field, Expression, Constant, Prompt or SubQuery. Based on the 'Expression 2 Type', a value dialogue box allows entry of the Expression 2 value. In the case displayed below, the Expression 2 is defined as a constant with a Date value entered.

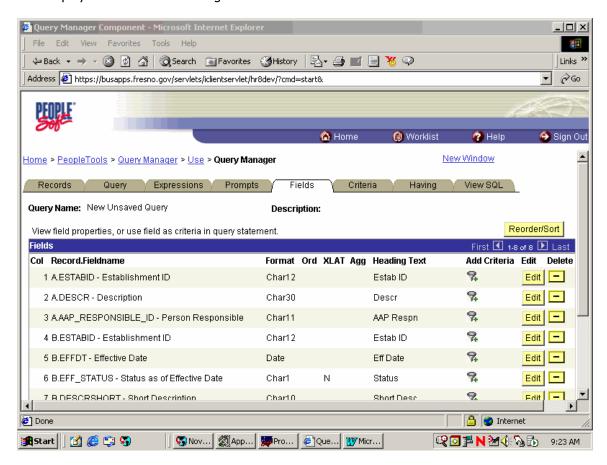


After clicking the 'OK' button, the expression list is displayed again. You may add, edit or delete expressions here.



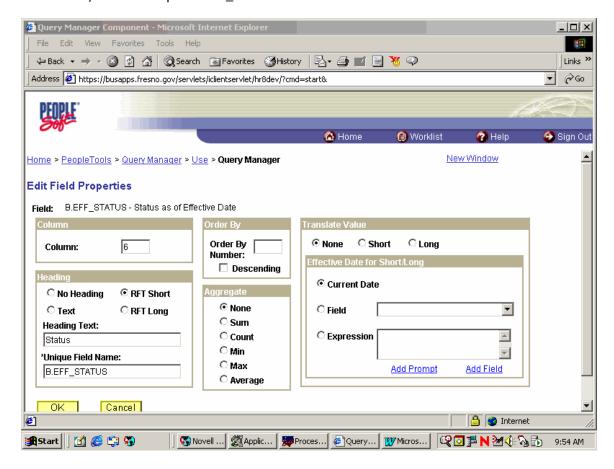
Clicking on the 'Use as Field' link will add the Expression as a Field to be listed in the Query output. A list of all Query Output fields is displayed with the Expression added to the list.

This display is the same as clicking on the 'Fields' action-tab:



Clicking on the 'Edit' button, for a Fieldname, will present the Edit Field Properties dialogue window.

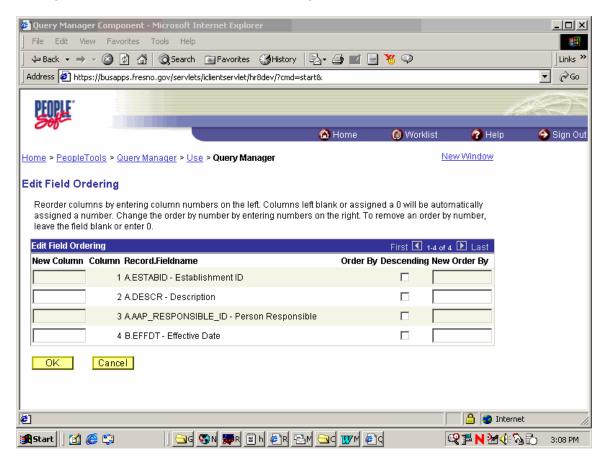
In this case, the edit is upon B.EFF_STATUS:



The Field attributes may be modified, given a Field's definition.

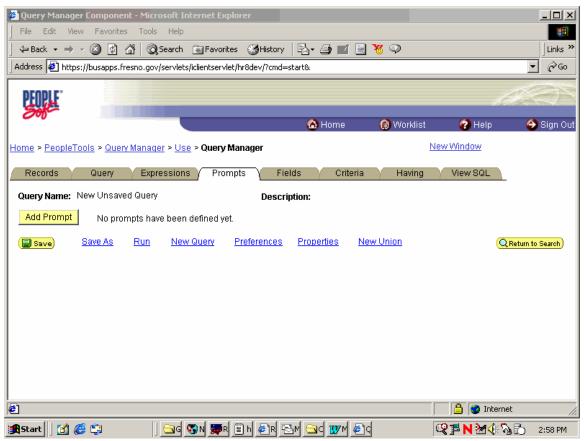
Note the Aggregate Function here allows specification of an Aggregate Field for use in a 'Having' clause within the selection definition.

Clicking on the 'ReOrder/sort' link allows re-sorting as follows:



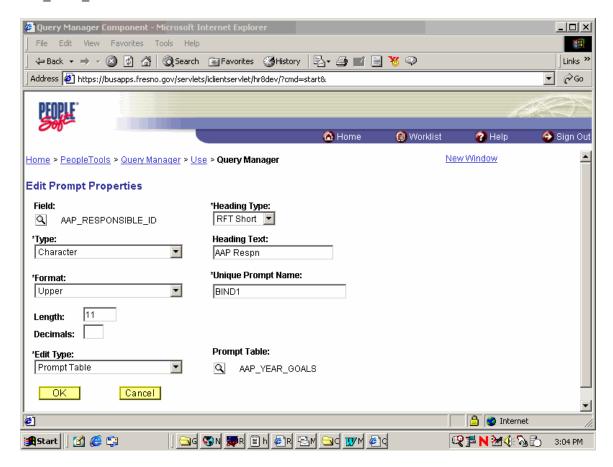
Click OK or Cancel after entering Field Ordering Info. This returns you to the main Query Editor.

Clicking on the 'Prompts' tab allows prompt definition for the query:



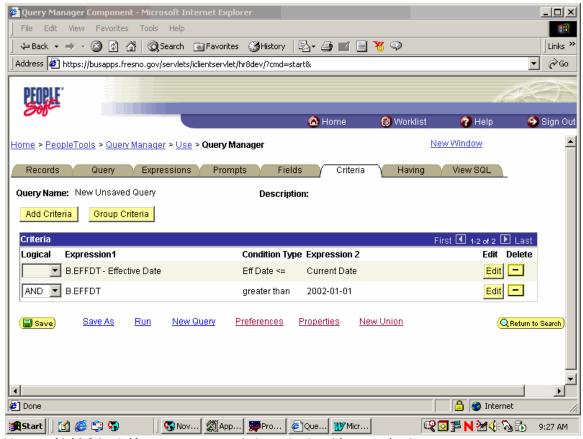
Clicking on the 'Add prompt' button initiates that action. The Edit Prompt properties dialogue window is displayed.

Click on a Prompt Field to select it. You may also specify field-type, format, length, decimals, edit-type, heading-type, heading-text and unique prompt-name. In this example, the field AAP_RESPONSIBLE_ID is chosen as the prompt field, and it's specified to work against the AAP_YEAR_GOALS table.



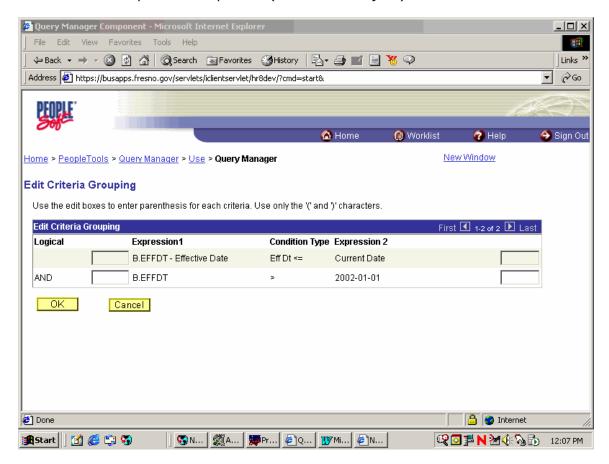
You may OK or Cancel the edited properties.

Clicking on the Criteria tab displays the currently defined Query Selection Criteria for editing:

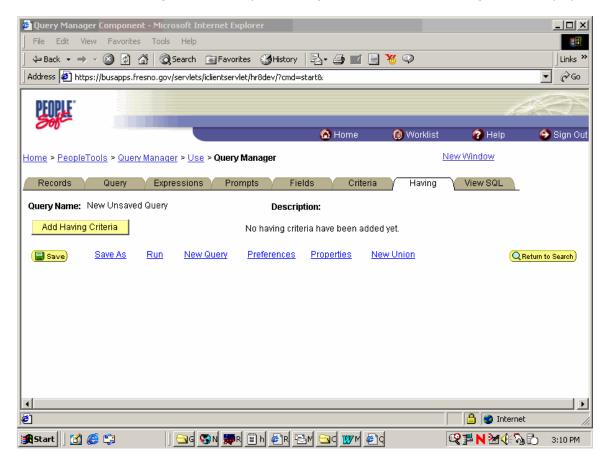


You can 'Add Criteria' here, or group existing criteria with parenthesis.

Our example phrase is not complicated, however 'grouping' may be required in more complicated selections with multiple boolean operators ('and' 'or' criteria joins).

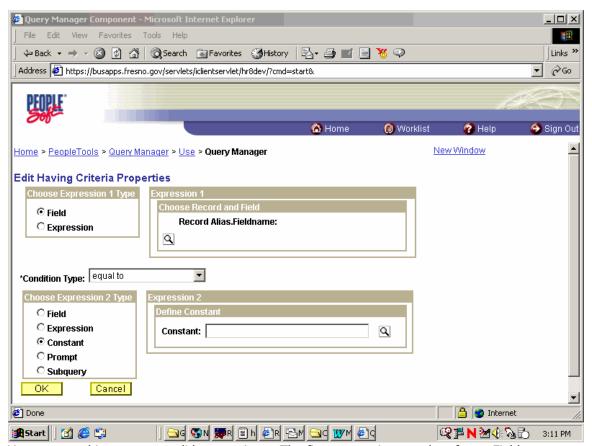


You may OK, or Cancel edited changes (returning you to the Criteria page).



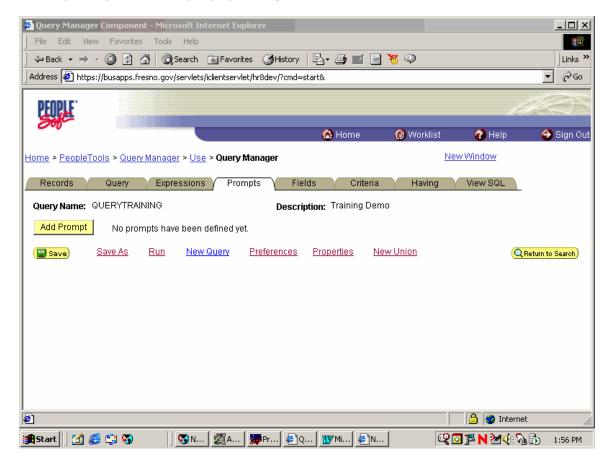
Clicking the 'Add Having Criteria' button allows you to build a Selection Criteria as a 'Having' clause in the SQL statement.

Click the 'Add Having Criteria' button and the 'Edit Having Criteria Properties' dialogue window appears:

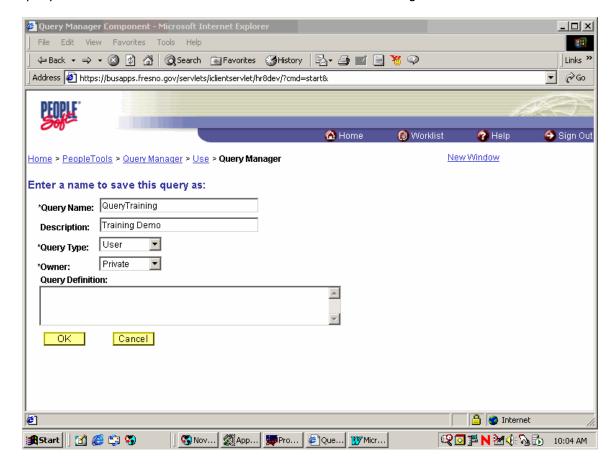


You may combine any two valid expressions. The first expression may be of type Field or Expression. The second expression may be of type Field, Expression, Constant, Prompt or SubQuery. Click OK or Cancel to save edited changes.

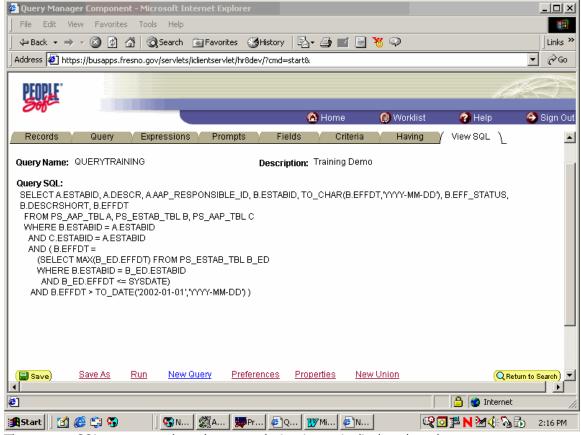
You may save your defined query by clicking on the 'Save' or Save As' icon.



This presents the "Save Query" dialogue window, allowing a name, description, type, owner & query-definition to be entered. Click on OK or Cancel after editing data:

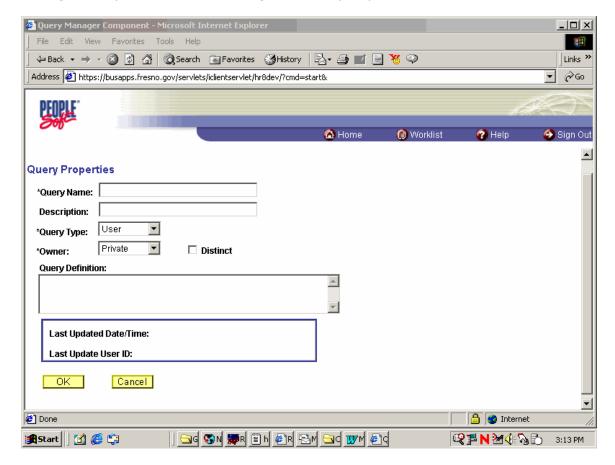


Going back a page, clicking on the 'View SQL' tab displays the SQL you defined:



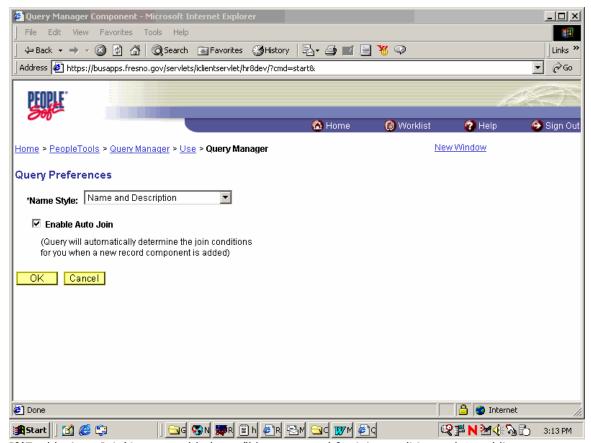
The current SQL-statement, based on your design-input, is displayed on the screen.

Clicking the 'Properties' link allows editing of the Query Properties:



You may edit these values, and click OK or Cancel.

Clicking the 'Preferences' link allows you to set 'Name Style' and table join preferences:



If 'Enable Auto Join' is not enabled, you'll be prompted for join conditions when adding new record components.

APPENDIX:

SSN

Employee ID

PAY_CHECK

Common HR, PR and TL Tables v.8.3

Listed are the most commonly used query tables in HR, PR and T&L. Not all tables are listed, and not all fields within the tables, but these should fulfill most of the needs in the field.

```
PERSONAL_DATA
       Employee ID
       Name
       Address
       Phone
       Original Hire Date
       Gender
       Birth date
EMPLOYMENT
       Employee ID
       Hire Date (same as Original Hire Date)
       Service Date (the date on which leave accruals are based)
       Termination Date
       Last Increase Date
       Job Title
       Last Date Worked
JOB
       Employee ID
       Effective Date
       Department ID
       Job Code
       Position Number
       Employee Status
       Regular/Temp
       Full/Part Time
       Paygroup
       Step
       Step Entry Date
       Account Code
       Review Date
       Compensation Rate
PERSONAL_VW
       Employee ID
       Name
PERS SRCH GBL
       Employee ID
       Name
```

Name

Pay End Date

Total Gross

Total Taxes

Total Deductions

Net Pay

PAY EARNINGS

Employee ID

Pay End Date

Additional Pay Line Number

Earnings Begin Date

Earnings End Date

PAY_OTH_EARNS

Pay End Date

Additional Pay Line Number

Earn Code

Hours

Earnings

TL RPTD ELPTIME

Employee ID

Date under Report

Time Reporting Code

Quantity

PC Business Unit

Project ID

Account Code

Resource Type

Activity ID

TL_PAYABLE_TIME

Employee ID

Date under Report

Time Reporting Code

Quantity

Labor Distributed Amount

Payable Status

Frozen Status

Approval Date/time Stamp

PC Business Unit

Project ID

Account Code

Resource Type

Activity ID

TL_EMPL_DATA

Employee ID

Effective Date

Time Reporter Status

Time Reporting Template

Workgroup

Taskgroup Task Profile ID

TL_GROUP_DTL

Group ID

Group Type Indicator

Employee ID

TL_NAME_VW

Employee ID

Name

TL_TASKGRP_TBL

Taskgroup

Effective Date

Effective Status

Task Profile ID

Description

Elapsed Reporting Template

TL_TSKPRF_DETL

Taskgroup

Task Profile ID

Effective Date

Allocation Percent

PC Business Unit

Project ID

Account Code

Resource Type

Activity ID

Z EMPL DATA

Employee ID

Perm Status Date

Pension Date

Date Next Increase

Date Next Evaluation

Z_PR_GL_REPORT – This table is a good summary, by pay period, of employee costs including fringe

Employee ID

Name

CFTI Record Type

Earn Code

Account Code

GL Account

PC Business Unit

Project ID

Activity

Distributed Amount

Hours

The **Field** attributes defined within a query context:

Col	Assigns the column order in which the results of the Query will be displayed.
Record.Field	The first letter indicates the Record from which this field came. This letter is useful when more than one Record is included in the Query. The Field name appears after the decimal point.
Format	Indicates the length of the associated field, and what sort of data is stored within. For example, Char20 indicates that up to twenty characters (letters or numbers) may be stored in this field. While Num3.1 indicates that three digits (numbers only) with one decimal value may be stored in this field.
Rel	Indicates that this field has a related record that may be added to the Query to give further definition to the results. For example, the STATE field has a related record. Normally, only a two-character abbreviation for state would display. It's necessary to join this record to the Query to display the associated DESCR (Description).
Ord	Defines the order in which the results will be sorted once the Query has been run. For example, if a "1" appeared in this column next to the EMPL_ID field, the results would be returned in the numerical order according to Employee ID.
XIt	If the associated field has a description stored on the <i>Translate Table</i> , this column may be utilized to select which view (long or short) will display.
Agg	Used to define options for summarizing Query results.
Heading	Displays the text that will appear as the column header when the results are displayed.